

Virtual Lab

Event Schedule

Enterprise Permitting & Licensing

June 2023 – September 2023

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Virtual Lab Event Schedule

For any questions about our Virtual Lab Program, please contact liz.anderson@tylertech.com or amber.koester@tylertech.com. Tyler Technologies offers the following training opportunities for Enterprise Permitting & Licensing:

June	Event	Hours	Eastern Time
June 1	Navigation with Hub	2.5	10:00 AM – 12:30 PM
June 6	Plan Management App	2.0	10:00 AM – 12:00 PM
June 7	Permit Management App	2.0	10:00 AM – 12:00 PM
June 8	User Setup & User Roles	2.0	10:00 AM – 12:00 PM
June 9	User Setup & User Roles	2.0	10:00 AM – 12:00 PM
June 13	Custom Fields	3.0	10:00 AM – 1:00 PM
June 14	Workflow Basics & Configuration	3.0	10:00 AM – 1:00 PM
June 15	Cashiering Fee Basics & Configuration	3.0	10:00 AM – 1:00 PM
June 16	Permit Configuration	2.0	10:00 AM – 12:00 PM
June 20	IO, IAA, Geo Rules	3.0	10:00 AM – 1:00 PM
June 21	Contact Management	2.0	10:00 AM – 12:00 PM
June 22	Civic Access – End User	3.0	10:00 AM – 1:00 PM
June 23	Civic Access – Admin	5.0	9:00 AM – 2:00 PM
June 27	eReviews – Review Coordinator & Manage My Reviews - Demo VL	2.5	10:00 AM – 12:30 PM
June 28	Code Management Apps & Configuration	3.0	10:00 AM – 1:00 PM
June 29	Code Enforcement Mobile – Demo VL	1.5	10:00 AM – 11:30 AM
July	Event	Hours	Eastern Time

No classes are scheduled in July. We apologize for any inconvenience.

August	Event	Hours	Eastern Time
Aug 3	Navigation with Hub	2.5	10:00 AM – 12:30 PM
Aug 8	Contact Management	2.0	10:00 AM – 12:00 PM
Aug 9	Cashiering End User	2.5	10:00 AM – 12:30 PM
Aug 10	Business License and Civic Access	2.5	10:00 AM – 12:30 PM
Aug 15	Civic Access – End User	3.0	10:00 AM – 1:00 PM
Aug 16	Civic Access – Admin	5.0	9:00 AM – 2:00 PM
Aug 17	eReviews – Review Coordinator & Manage My Reviews - Demo VL	2.5	10:00 AM – 12:30 PM
Aug 22	eReviews Admin	5.0	9:00 AM – 2:00 PM



August	Event	Hours	Eastern Time
Aug 23	Workflow Basics & Configuration	3.0	10:00 AM – 1:00 PM
Aug 24	IO, IAA, Geo Rules	3.0	10:00 AM – 1:00 PM
Aug 29	Inspection Management App	2.0	10:00 AM – 12:00 PM
Aug 30	Inspections Mobile – Demo VL	1.5	10:00 AM – 11:30 AM
September	Event	Hours	Eastern Time
Sept 6	Code Management Apps & Configuration	3.0	10:00 AM – 1:00 PM
Sept 7	Code Enforcement Mobile – Demo VL	1.5	10:00 AM – 11:30 AM
Sept 8	Plan Management App	2.0	10:00 AM – 12:00 PM
Sept 12	Standard Review – Manage My Reviews	2.0	10:00 AM – 12:00 PM
Sept 13	Plan Configuration	2.0	10:00 AM – 12:00 PM
Sept 14	Inspection Configuration	2.5	10:00 AM – 12:30 PM
Sept 19	User Setup & User Roles	2.0	10:00 AM – 12:00 PM
Sept 20	Custom Fields	3.0	10:00 AM – 1:00 PM
Sept 21	Cashiering Fee Basics & Configuration	3.0	10:00 AM – 1:00 PM
Sept 26	System Settings & Global Setups	5.0	9:00 AM – 2:00 PM
Sept 27	Permit Management App	2.0	10:00 AM – 12:00 PM
Sept 28	Permit Configuration	2.0	10:00 AM – 12:00 PM

More classes to follow soon. Schedule released each quarter.



Class/Event Descriptions

Tyler Technologies offers the following training opportunities outlined in the descriptions below. For more information, please visit [Tyler University](#). To find out which events are tailored for end users, and which are more appropriate for administrators, please refer to [Appendix B](#).

Business License & Civic Access

Length: 2.5 Hours

Intended Audience: End users who need to understand how citizens apply and manage business licenses through Tyler's public-facing web application, Civic Access.

Description: Instructors explain how a citizen submits a business license application in Civic Access, previously known as Citizen Self Service (CSS). Once a citizen submits an application, municipalities use the Permitting & Licensing Business module to manage businesses. In the class, attendees learn how to manage a business and a business license, view attached licenses, create a tax remittance account, and view attached tax remittance accounts from a business record. Attendees also renew a business license and learn to manage the fees associated with a renewal in Permitting & Licensing. Instructors also explain how citizens renew a business license in Civic Access.

Cashiering Fee Basics & Configuration

Length: 3.0 Hours

Intended Audience: Administrators who are responsible for various components of setup and configuration of Enterprise Permitting & Licensing.

Description: Instructors provide an understanding of the cashiering settings related to the suite; this includes user permissions and security options for user roles. Students also explore setup apps such as Fee Schedules, GL Accounts, Payment Methods, Fees, and Fee Templates. Instructors show attendees how to configure the four basic types of fees and review the settings for each fee type. Users create a basic fee template and learn how it is associate to a type/class combination.

Cashiering – End User

Length: 2.5 Hours

Intended Audience: End users who need to understand the cashiering module within Enterprise Permitting & Licensing. If you click Pay Now inside of the Permitting & Licensing suite, then this class is for you.

Description: End users leverage the Cashiering module to invoice and transact payments within the suite. They learn how to create and manage an invoice. Instructors cover how to open a batch and make a payment. Users understand how to process a void, refund, and NSF, and close a batch.



Civic Access – Admin

Length: 5.0 Hours

Intended Audience: Administrators who need to understand the administration of Civic Access.

Description: This course is designed for individuals who are responsible for the administration of Enterprise Permitting & Licensing's Civic Access, previously known as Citizen Self Service (CSS). The focus is how to manage the site configuration options, as well as configuring the system to provide external access to information. At the end of the training course, candidates will understand the key functional and technical components that are comprised within the Civic Access Administration.

Civic Access – End User

Length: 3.0 Hours

Intended Audience: Enterprise Permitting & Licensing (EPL) users who need to understand the portal user experience of Civic Access and its relationship to EPL.

Description: This course is designed for any EPL user who needs understanding of its integration to Civic Access. Attendees will learn how to navigate through a sample Civic Access site and perform various activities, such as applying for a permit. Instructors also explain the Civic Access account registration process and how it links to related records in the Permitting & Licensing suite. Access to EPL is also provided to students during this virtual session so they can perform and witness data updates between systems in real time.

Code Enforcement Mobile – Demo VL

Length: 1.5 Hours

Intended Audience: End users who need to understand the Code Enforcement Mobile app.

Description: Attendees learn how to use the Code Enforcement Mobile app (previously known as iG Enforce) on an iPad to manage and create code cases from the field. Instructors demonstrate how to view daily inspections for cases, complete inspection details, add new requests or code cases while in the field, manage assigned cases by adding details, violations, and attachments, and synchronize the case to the Permitting & Licensing suite. This Virtual Lab is demo only.

Code Management App & Configuration

Length: 3.0 Hours

Intended Audience: Administrators who are responsible for various components of setup and configuration of the Code module.

Description: Attendees learn how to create a case in the Code Case module and add violations, process fees, create inspections and/or hearings, print code case documents, and close the case. Instructors explain how to create and manage the configuration aspects of the code module. Topics include code categories, violations, code case types, and code workflows.



Contact Management

Length: 2.0 Hours

Intended Audience: Administrators who are responsible for various components of setup and configuration of the Contact module.

Description: Attendees learn about global contacts and best practices for their business processes. The class covers how to create a new global contact and associate it to a record. Instructors explain the concept of contact types and license validation for various contact types. End users also learn how to use the Merge Contact App to manage data integrity of global contacts.

Custom Fields

Length: 3.0 Hours

Intended Audience: Administrators who are responsible for various components of setup and configuration of Enterprise Permitting & Licensing.

Description: Instructors explain the purpose of custom fields and how they capture information that the suite does not collect within the standard fields. Admins learn which types of custom fields they can add to a layout and how to insert tabs on a layout to keep information organized. Instructors review how the suite uses the database names of custom fields and how to connect the custom field layout to a type/work class and an activity. Students learn how Civic Access leverages custom fields when different than the back office.

eReviews Admin – Demo VL

Length: 5.0 Hours

Intended Audience: Administrators who are responsible for various components of setup and configuration of eReviews.

Description: Instructors demonstrate how the configuration of eReviews ties in with Permitting & Licensing end-user pages, such as Review Coordinator and Manage My Reviews apps. Attendees learn best practices for configuration and administration of the eReviews integration with a Bluebeam Prime Portal Account. This Virtual Lab is demo only.

eReviews – Review Coordinator & Manage My Reviews– Demo VL

Length: 2.5 Hours

Intended Audience: End users who manage reviews conducted by multiple people or departments and who need to understand the process of eReviews integration to Bluebeam.

Description: Instructors demonstrate the eReviews process with the integration to Bluebeam studio sessions. End users learn about the responsibility of the back-office users when a review is active in the workflow and understand the citizen's view within Civic Access. Attendees also learn about the purpose and functions of the Review Coordinator and Manage My Reviews HTML apps. Instructors demonstrate how reviewers access a Bluebeam studio session to create markups from Manage My Reviews. This Virtual Lab is demo only.



Inspections Mobile – Demo VL

Length: 1.5 Hours

Intended Audience: End users who need to understand the Inspections Mobile app.

Description: Attendees learn how to use the Inspections Mobile app (previously known as iG Inspect) on an iPad to view daily inspections, complete inspection details, view inspection history, add attachments and/or pictures, and sync inspections. This Virtual Lab is demo only.

Inspection Configuration

Length: 2.5 Hours

Intended Audience: Administrators who are responsible for various components of setup and configuration of the Inspection module.

Description: Attendees learn how to set up the Inspection module and configure the components in the correct sequence. This class covers Inspection Types, Inspector Types, and the inspection settings within System Settings, and related Windows Service Tasks.

Inspection Management App

Length: 2.0 Hours

Intended Audience: End users who need to understand the Inspection module.

Description: Attendees learn to use the Inspections module to create, schedule, and manage an inspection. Instructors teach students how to search for inspections, add an Inspection Case to a permit, and how to use the Inspection Management Dashboard and Schedule and Assign app.

IO, IAA, & Geo Rules

Length: 3.0 Hours

Intended Audience: Administrators who are responsible for various components of setup and configuration of Enterprise Permitting & Licensing.

Description: Attendees learn about Intelligent Objects (IOs), Automation Agent (IAA), Geo Queries and Geo Rules, and how to configure IOs to facilitate the running of a Geo Rule. The suite uses IOs to automate actions in a reactive manner. They are key components for triggering Geo Rules, computing fees, and generating emails, errors, alerts, and other notifications. The IAA automates tasks in a proactive manner. It sets values, generates emails, and performs other tasks. Instructors show students where to find setup guides, explain fields, and Geo Rule setup best practices.



Navigation – System Overview with Hub

Length: 2.5 Hours

Intended Audience: All end users of Enterprise Permitting & Licensing.

Description: Fundamental concepts of the Enterprise Permitting & Licensing suite and their application to everyday computer use. The class begins with Hub which is the landing page for the Enterprise Permitting and Licensing suite. Topics include Notifications, Tasks, Favorites, Custom Links, and recent cases. This class will also cover the functionality of the Omni Bar, Advanced Search and how to navigate of the various HTML apps such as Parcel Manager. Our hands-on lab environment will allow users to become familiar navigating the software to input, collect and analyze information, and generate reports and documents. Also, in this course, we will explore the “global” relationships that the suite has implemented to allow the software to be used across multiple departments, serving multiple functions, yet serving as a central source of information accessible to all users. The suite provides a wide variety of approaches to searching for information/applications in the system.

Permit Configuration

Length: 2.0 Hours

Intended Audience: Administrators who are responsible for various components of setup and configuration of the Permit module.

Description: Attendees learn how to set up the Permit module and configure the components in the correct sequence. Instructors teach administrators how to identify Permit module settings and about their impact for a municipality, along with configuration tricks and tips.

Permit Management App

Length: 2.0 Hours

Intended Audience: End users who need to understand the Permit module.

Description: Attendees learn the tasks involved in processing a permit, including how to invoice and process fees, understand/manage workflow, complete Additional Info fields, create record-specific Activities, create and manage Conditions and Holds, and track Bonds.

Plan Configuration

Length: 2.0 Hours

Intended Audience: Administrators who are responsible for various components of setup and configuration of the Plan module.

Description: The user will learn each of the component for setting up the Plan module and the correct sequence in which to do them within Enterprise Permitting and Licensing. This will also include being able to identify the system settings that relate to the Plan module and the impact of the setup for a jurisdiction. Tricks and tips for configuration will be shared with the user.



Plan Management App

Length: 2.0 Hours

Intended Audience: End users who need to understand the Plan module.

Description: The user will learn the tasks involved in plan intake within Enterprise Permitting and Licensing. These tasks include but are not limited to invoicing and processing fees, understanding and managing the workflow, completing Additional Info fields, creating record specific Activities, applying and managing specific Conditions and Holds. In addition, this course will show users how to schedule and manage hearings and meetings and generate letters in the Plan Management module.

Professional License

Length: 2.0 Hours

Intended Audience: End users who need to understand the Professional Licensing module.

Description: Attendees learn how to issue a license to a contact (an individual) for a specific type and classification and manage fees. The class covers how to create, renew, and manage professional licenses. Attendees also learn how to associate a contact with a professional license.

Standard Review with Manage My Reviews

Length: 2.0 Hours

Intended Audience: End users who are involved with a submittal or review process.

Description: Instructors demonstrate the standard review process that the suite manages through the workflow of a plan, permit or licensing case showing how reviewers will access and manage their item review within Manage My Reviews. End users will complete item reviews and understand the review process cycle within the workflow.

System Settings & Global Setups

Length: 5 Hours

Intended Audience: Administrators who are responsible for various components of setup and configuration of Enterprise Permitting & Licensing.

Description: Instructors explain the purpose of system settings and global setups. Attendees learn about the components associated with District setup including department, district, system settings, zone, and holiday. Instructors explain the purpose and configuration of attachment groups, conditions, mailing address types, global meetings, global hearings, hearing types, cycle recurrences, meeting types, offices, tasks, and time types. Attendees learn how these components are related to other settings in the Permitting & Licensing suite.



User & User Roles

Length: 2.0 Hours

Intended Audience: Administrators who are responsible for various components of setup and configuration of Enterprise Permitting & Licensing.

Description: Attendees learn how to create a new user in the Permitting & Licensing suite and manage and deactivate an existing user. Instructors explain the relationship between a user and a role and how to customize role security settings and restrict access.

Workflow Basics – End User

Length: 2.0 Hours

Intended Audience: All end users of Enterprise Permitting & Licensing.

Description: Attendees learn about workflow functionality and review the most common types of workflow actions. Instructors teach attendees about the purpose of workflow, priority, and sort order, and how to add optional steps and actions.

Workflow Basics & Configuration – Admin

Length: 3.0 Hours

Intended Audience: Administrators who are responsible for various components of setup and configuration of Enterprise Permitting & Licensing.

Description: Attendees learn about workflow functionality and review the most common types of workflow actions. Instructors teach attendees about the purpose of workflow, priority, and sort order, and how to add optional steps and actions. Instructors cover how to configure a workflow template and associate it to a case type/work class combination.

Courses in Tyler University

Some courses in our Enterprise Permitting and Licensing virtual labs have been removed to make space for classes that are in higher demand. Please see our post on [Tyler Community for more video information](#).

Some courses that may be found in video format on Tyler University are:

1. Map App
2. Advanced Search, Documents, and System-Wide Reports



APPENDIX A: Certification Tracks

Tyler has removed the dedicated Certification Tracks from its online offerings this year. The intention is to allow jurisdictions to be able to take classes without the focused demand of an 8-hour instruction day or a 32-hour instruction week when learning the material. Certification Tracks were a combination of Virtual Lab classes. Our certification courses are woven into the regular offerings for 2023. These tracks are listed by title below with the list of specific classes that would make up that track. For more details, please refer to [Tyler Community](#).

Certification Tracks include the following topics:

Civic Access Track

- Civic Access – End User
- Civic Access - Admin

eReviews Track

- Permit/Plan Management apps
- Standard Review – Manage My Reviews
- eReviews – Review Coordinator & Manage My Reviews Demo VL
- eReviews Admin Demo VL

End User Apps Track

- Navigation – System Overview with Hub
- Plan Management App
- Permit Management App
- Workflow Basics – End User
- Inspection Management App
- Code Management App
- Business License & Civic Access
- Professional License

Community Development Track

- Navigation – System Overview with Hub
- Permit Management App
- Permit Configuration
- Plan Management App
- Plan Configuration
- Standard Review – Manage My Reviews
- eReviews – Review Coordinator & Manage My Reviews Demo VL
- eReviews Admin
- Inspection Management App
- Inspection Configuration
- Inspections Mobile – Demo VL

System Admin Track

- Navigation – System Overview with Hub
- Contact Management
- User Setup & User Roles
- System Settings & Global Setups
- Custom Fields
- Workflow Basics & Configuration
- Cashiering Fee Basics & Configuration
- IO, IAA, & Geo Rules



APPENDIX B: End-user vs. Admin Training

	Event name	End user	Admin
1	Business License & Civic Access	X	
2	Cashiering Fee Basics & Configuration - Admin		X
3	Cashiering – End User	X	
4	Civic Access - Admin		X
5	Civic Access – End User	X	
6	Code Enforcement Mobile – Demo VL	X	
7	Code Management App & Configuration		X
8	Contact Management	X	X
9	Custom Fields		X
10	eReviews Admin – Demo VL		X
11	eReviews – Review Coordinator & Manage My Reviews – Demo VL	X	
12	Inspection Configuration		X
13	Inspection Management App	X	
14	Inspections Mobile – Demo VL	X	
15	IO, IAA, & Geo Rules		X
16	Navigation – System Overview with Hub	X	
17	Permit Configuration		X
18	Permit Management App	X	
19	Plan Configuration		X
20	Plan Management App	X	
21	Professional License	X	
22	Standard Review – Manage My Reviews	X	
23	System Settings & Global Setups		X
24	User Setup & User Roles		X
25	Workflow Basics & Configuration – Admin		X
26	Workflow Basics – End User	X	

